

Utilization Plan: View Plan

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D47208H: Replace Heating System, Office & Garage Region 8  
Clinton Corners

Status: **Open**  
Estimated Cost: **\$932,829**

This Utilization Plan has been Approved. Scroll down to view the details of the plan. Click the button to transfer some or all of the subcontract records to an existing contract. Once a record is transferred it cannot be transferred again. However if any subcontractors are not included in the transfer they will remain available for transfer. After the transfer process is complete a Linked Contract field will appear to provide quick access to the contract. Use the Linked Contract field to access the contract that subs were previously transferred to.

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Utilization Plan Summary


PROPOSAL	D47208H: Replace Heating System, Office & Garage Region 8 Clinton Corners
REFERENCE	47208H
PHASE	Original, version 0
STATUS	 <b>Approved</b>
NOTIFICATION DATE	5/18/2023 by Shafia Booker
DUE DATE	5/24/2023 5:00 pm US/Eastern
SUBMISSION DATE	5/23/2023 by Heather Cleveland
REVIEW DATE	5/24/2023 by Shafia Booker
REVIEWER PUBLIC COMMENTS	<p>Your plan has been Accepted As Noted for MWBE purposes only. The MWBE goal has not been waived or lowered. All listed subcontractors and suppliers must also be submitted for review and approval to the OGS Vendor Responsibility Group prior to participating in this project using the BDC329 form. Once contract is awarded, any additional subcontractor changes must be submitted to the Vendor Responsibility Group for review and approval (BDC329).</p> <p>Per our conversation your firm has agreed to continue its efforts to meet the remaining goal throughout the course of the contract.</p> <p>Contact our office if you need any assistance</p>
REVIEWER PRIVATE COMMENTS	Confirmed





Award To Contract

Utilization Plan Information

















ESTIMATED BID / TRANSACTION AMOUNT	\$932,829
PRIVATE COMMENTS	Compliance Specialists, please ensure contractor identifies the proper credit to be granted to brokers, manufacturers, and suppliers.

## Primary Bidder/Prime Contractor



Vendor Name	Cert	Inc in Goal	\$ Total	\$ Self Perf	\$ For Credit	Actions
 <b>S &amp; O CONSTRUCTION SERVICES INC</b>	<a href="#">No</a>	No	\$932,829	\$727,521 77.99%	-	<a href="#">View</a>

Work Code Validation Symbol Legend:  All assigned work codes are valid;  Some assigned codes are not valid;  No assigned work codes are valid;  No work codes are assigned.

## Subcontractors

Subcontractor Name	Sub Tier	Cert	Inc in Goal	Type	Valid Work Code	\$ Commit	\$ Self Perf	\$ For Credit	Actions
 <b>Arold Construction Co Inc</b> NAICS 237110: Utility line (i.e., sewer, water), construction NAICS 237120: Pipeline rehabilitation contractors NAICS 237310: Highway, Street, and Bridge Construction NAICS 541990: Pipeline inspection (i.e., visual) services	1		 WBE	Sub 100%		\$150,940 16.18%	\$150,940 16.18%	\$150,940 16.18%	<a href="#">View</a>
 <b>Encon Services &amp; Supply Inc</b> NAICS 238210: Temperature control system installation	1		 MBE	Sub 100%		\$36,368 3.90%	\$36,368 3.90%	\$36,368 3.90%	<a href="#">View</a>
 <b>Mechanical Testing, Inc</b> NAICS 238220: Air system balancing and testing NIGP 99247: HVAC System Testing, Balancing and Troubleshooting Services	1		 WBE	Sub 100%		\$8,000 0.86%	\$8,000 0.86%	\$8,000 0.86%	<a href="#">View</a>
 <b>R I M Plumbing and Heating Supply, Inc.</b> NAICS 326191: Plumbing fixtures (e.g., shower stalls, toilets, urinals), plastics or fiberglass, manufacturing NAICS 4237: Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers NAICS 42371: Hardware Merchant Wholesalers NAICS 425120: Wholesale Trade Agents and Brokers NIGP 03106: Air Conditioning and Heating Central Air Systems, Including Parts and Accessories, (Not Otherwise Classified) NIGP 45000: HARDWARE AND RELATED ITEMS NIGP 67000: PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES ESD C-0833: AIR CONDITIONING SUPPLIES AND EQUIPMENT ESD C-2713: BOILER SALES (MANUFACTURER REP) ESD F-0505: PLUMBING FIXTURES AND SUPPLIES ESD F-0851: HEATING EQUIPMENT AND SUPPLIES ESD G-0321: HARDWARE	1		 WBE	Reg. Dealer <b>60%</b>		\$10,000 1.07%	\$10,000 1.07%	\$6,000 0.64%	<a href="#">View</a>

## Goal & Waiver Summary

Goal Type	Goal	Plan	Status	\$ to Reach Goal	Waiver Status
<b>Overall Goal</b>	<b>30.00%</b>	<b>21.58%</b>	<b>-8.42% below goal</b> 	<b>\$78,541</b>	 <b>Waiver Request saved</b>

we are over in our WBE goal and will continue to provide good faith efforts in obtaining a MBE

<b>MBE</b>	<b>15.00%</b>	<b>3.90%</b>	<b>-11.10% below goal</b> !	<b>\$103,556</b>	 <b>Waiver Request saved</b>
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we are over in our WBE goal and will continue to provide good faith efforts in obtaining a MBE

<b>WBE</b>	<b>15.00%</b>	<b>17.68%</b>	<b>2.68% above goal</b>
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## Signature

SIGNATURE	<b>Heather DeClair</b>
TITLE	<b>Administrative Assistant</b>
ORGANIZATION	<b>S &amp; O CONSTRUCTION SERVICES INC</b>
SIGNATURE DATE	<b>5/23/2023</b>

## Additional Instructions

ADDITIONAL INSTRUCTIONS TO  
VENDOR

SPECIAL INSTRUCTIONS TO  
VENDOR

**The MWBE utilization credit for Work performed by MWBEs will be determined as follows: a. Where an MWBE is not the Contractor - MWBE utilization credit will vary depending on how the MWBE performs Work under the Contract, as follows: i. Where the MWBE performs Work under the Contract as a subcontractor, MWBE utilization credit will be 100% of the dollar value of the Work performed by the MWBE. ii. Where the MWBE performs Work under the Contract as a manufacturer, MWBE utilization credit will be 100% of the dollar value of the Work performed by the MWBE. ii. Where the MWBE assists in the performance of the Work under the Contract as a supplier, MWBE utilization credit will be 60% of the dollar value of the Work performed by the MWBE. For purposes of this Contract, a supplier is a firm that operates a store, warehouse, or other establishment where materials, supplies, or equipment required under the Contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business. Suppliers purchase and sell products as their principal business under their own name. A supplier must purchase and keep materials in stock and have a method to sell those materials to the public, through a storefront or website, and cannot supply materials specifically for a single contract. Suppliers of large bulk items must derive over 40% of their business from inventory in their warehouse and must take legal responsibility of the items, even if some items are drop-shipped. iv. Where the MWBE assists in the performance of the Work under the Contract as a broker, MWBE utilization credit will be equal to the percentage of the commission, or the mark-up percentage, of the items brokered, applied to the dollar value of the Work performed by the MWBE. For purposes of this Contract, a broker is a firm that fills orders for a client by ordering, purchasing, or receiving supplies from a third-party supplier rather than out of its own existing inventory and, in light of the standard industry practices, provides no substantial services other than acting as an intermediary between a supplier and a customer. v. Where the MWBE assists in the performance of the Work under the Contract as a manufacturer's representative, MWBE utilization credit will be equal to the percentage of the commission, or the mark-up percentage, of the items**

**brokered, applied to the dollar value of the Work performed by the MWBE. For purposes of this Contract, a manufacturer's representative is considered to be a broker.**

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